

Initiative: Develop an Imaging and Document Management System

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Initiative Mission
To identify, design, and develop imaging and document management business requirement's to enhance the Financial Partners Channel business processes. Solutions should include handling unstructured information, designing enterprise information portals, capturing tacit knowledge, managing documents through the enterprise, and using collaborative workgroup software.

Goals	Key Success Indicators
Engineer processes and technology to be more efficient and cost effective.	Reduced payment processing errors and improved customer satisfaction rating.
Provide communication to team members and other members of the channels to keep all parties informed of accomplishments and issues.	Critical impacted audiences are aware of initiative outcomes and how they are impacted.
Develop and implement new processes and work procedures.	Employees and systems are performing engineered processes.
Identify best in business practices and technology.	Reduced payment processing errors and improved customer satisfaction rating.

Initiative Milestones/Deliverables	Target Completion Date	Responsible Party
Identify Internal/External processes	TBD	TBD
Identify Pilot Process	TBD	TBD
Identify Commercial Off the Shelf packages to assist in implement task	TBD	TBD

In-Project Scope	Out of Project Scope
Frequently accessed documents	Workflow functionality
Multiple resources accessing documents	Infrequently accessed documents
	External Documents (Data not in ED control)